Session 2: Module 1 – Emailed Appointment Reminders	
FINAL	
Description	**Text**
1.	**Welcome** to M-SPIRIT **Session 2, Module 1**, of the M-SPIRIT Optional Online Training presented by the Montana Department of Public Health and Human Services WIC Program.
2.	Emailed Appointment Reminders
3.	M-SPIRIT automatically emails appointment reminders to participants via the End of Day (or EOD)Process, if you use the appointment scheduling functionality of the system,
	If a Clinic has enabled Emailed Appointment Reminders, any participant with an email address in Demographics will receive upcoming Appointment Reminders via that email address.
	When an appointment reminder is emailed to the participant, a system note will be put in the participant folder, by the EOD process, indicating that an appointment reminder was emailed.
	This functionality is being used by the Flathead and Gallatin agencies as of September 1, 2011.
	To use this functionality, some set up is required by the Clinics and State Office.
4.	Emailed Appointment Reminders –Clinic Setup
5.	The participant email address in Demographics is used to send automated Emailed Appointment Reminders to participants.
	All clinics should inform their participants that the information provided in Demographics may be used to contact them.
	If a participant does not wish to receive emails from WIC, you should leave the email address blank in Demographics.
	If there is no email address for the participant, M-SPIRIT will not attempt to send that participant an appointment reminder.
6. Reminder Interval	The Reminder Interval is the number of days before the scheduled appointment that the email reminder should be sent.
	The Reminder Interval is a required field for every appointment type defined in the Central Administrate Site (CAS) Module.
	Local Agencies should review their appointment types in the CAS and modify the Reminder Interval, if necessary.
	The Reminder Interval for System-defined appointment types is 7 and cannot be changed by the LAs.

Session 2: Module 1 – Emailed Appointment Reminders	
FINAL	
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	However, the State Office can change this value for the LA, if they request a change.
7.	Prior to enabling the Automated Email Appointment Reminders, the LA should ask the State Office to verify that all of their Participant email addresses have the correct form.
	The State Office can verify the form of the email, but cannot verify that the email is actually correct.
	If the form of an email is bad, the SO will remove the email address from the household and will inform the clinic or LA of the household id and the email address.
8.	The Local Agency must provide the State Office with an Agency email address or email addresses for the clinics.
	Each email address will appear as the sender of emailed Appointment Notices for the clinic or Local Agency.
	These email accounts should not be personal accounts, but rather, should be general WIC accounts.
	Having an Email Address in M-SPIRIT for the clinic "Turns On" the Automated Emailed Appointment Reminders Functionality!
	The Local Agency should call the WIC Helpdesk when it is ready to "Turn On" the Automated Emailed Appointment Reminder functionality, and the Helpdesk will put the email address into M-SPIRIT for each clinic.
9.	Emailed Appointment Reminders – State Office Setup
10.	When asked by the LA, the SO will examine all participant email addresses for correct form.
	If asked by the LA, the SO will modify the Reminder Interval for System Defined Appointment Types in the CAS.
	When the LA is ready to turn on the Automated Emailed Appointment Reminders, the SO Helpdesk will add the clinic email address or addresses to the clinics within the LA that will be having Automated Emailed Appointment Reminders.
11.	Emailed Appointment Reminders – Example
12.	For our example, we want the Reminder Interval for all Appointment types to be 2 days.
	Appointment Types are maintained in the Central Administrative Site Module, so we will need to log into the CAS.

Session 2: Module 1 – Emailed Appointment Reminders	
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	In this example, we are already logged into the M-SPIRIT Session Manager. Remember, you can tell because of the W by the time.
	So, all you need to do is start the CAS.
	Click on Start.
13.	Click on All Programs.
14.	<no script>
15.	Click below the scroll bar to see the bottom of the list of programs.
16.	Click on WIC Applications.
17.	<no script>
18.	Click on Central Administrative Site.
19.	<no script>
20.	We are changing the Appointment Reminder Intervals for the Riverstone Agency, click OK.
21.	<no script>
22.	Click on Activities
23.	Click on Build Master Calendar.
24.	<no script>
25.	Click on Calendar
26.	Click on Appointment Types
27.	<no script>
28.	The Appointment Type window lists all Appointment Types defined for the Agency.
	System Defined appointment types appear at the top of the list and have a checkmark under "System Defined".
	Let's take a look at System-Defined Appointment Type INITIAL CERTIFICATION.
	Click on Edit…
29.	Notice that Reminder Interval is 7 and cannot be modified.
	Also notice that the Appointment Type is defined for all clinics in the agency.
	Remember, you must ask the State Office to modify the Reminder Interval of System Defined Appointments.
	Let's assume that the SO has changed the Reminder Interval of System Defined Appointments for your Agency to 2 days.

Session 2: Module 1 – Emailed Appointment Reminders	
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	Click on OK.
30.	We will modify the reminder Interval for NEW APPOINTMENT.
	Click on the blank space below the scroll bar.
31.	Click on NEW APPOINTMENT.
32.	Click on Edit…
33.	Double Click in the Reminder Interval field.
34.	Type a 2 and click on OK.
35.	<no script>
36.	We will only change this one appointment type, but…
37.	You will do this for every Appointment Type that you want to change the Reminder Interval for.
	A Reminder Interval of 0 will cause appointment reminders not to be sent out for that type of appointment.
	Click on Close.
38.	Close the Calendar by clicking on Calendar
39.	Then Close.
40.	<no script>
41.	Exit the CAS by clicking on the Exit icon.
42.	The Reminder Interval is Reference Data.
	Remember, any time you change reference data, you must reset your local reference data to receive those changes.
	Right Click on the W. Due to limitations of this training tool, you may need to Left Click.
43.	Click on Reset Local Reference Data.
44.	<no script>
45.	<no script>
46.	<no script>
47.	Emailed Appointment Reminders – EOD Process
48.	Once the SO has entered the email address for your clinic(s), the automatic emailed appointment notice processing will begin that evening.
	Appointment notices will be emailed every evening.
49.	This is what an emailed Appointment Reminder looks like.

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	The Appointment Reminder text is defined by the State Office and cannot be changed by clinics.
	The Appointment Reminder prints in English unless the participant's correspondence preference is set to Spanish.
	Your Clinic or Local Agency email address will appear in the From field.
	The Subject of the email is Appointment Reminder.
	The participant is told what type of appointment they are scheduled for and when and where it is.
	They are told what to bring if the appointment is a certification appointment.
	They are given the clinic number to call if they have questions and they are asked not to reply to this email.
50.	The EOD processes will also add a System Note to the Participant Folder.
	The System Note states when the email was sent and for what type of appointment.
51.	Emailed Appointment Reminders – Ongoing Activities
52.	Clinics must check their clinic email daily.
	If an emailed Appointment Reminder cannot be delivered, a delivery failure email will appear in the Clinic's email inbox.
	The State Office can query the database, if requested, to determine the household with that email address.
	The clinic must then correct the household's email address.
	It is also possible that a participant has responded to the emailed appointment reminder.
53.	Emailed Appointment Reminders – Known Issues
54.	Badly formed email addresses detected during EOD will abort the Automated Email processing for that evening, from that participant on. The state office will remove the poorly formed email from the participant data and will inform the Local Agency or Clinic.
	Appointment Times use the 24 hour clock.
	As an example, the Emailed Appointment Reminder will list 1400 for a 2:00 p.m. appointment.
	These problems have been reported and should be fixed in the future.
55.	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Frequently Asked Questions forum on the Montana WIC website.